

# MEASURE B PROGRAM COMPLIANCE REPORT

## Signature Cover Sheet *Fiscal Year 2013-14*

Agency Name:

Revision Number:

Choose the type(s) of report you are submitting (*check all that apply; Tables 1-3 are required*)

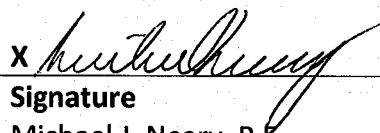
- Annual Program Compliance Report – Bicycle and Pedestrian Safety Funds
- Annual Program Compliance Report – Local Streets and Roads Funds
- Annual Program Compliance Report – Mass Transit Funds
- Annual Program Compliance Report – Paratransit Funds
- Tables 1- 3: Program Summary of Revenues, Expenditures, and Reserves (Excel workbook)

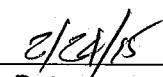
List any additional attachments included in the submittal (*check all that apply*).


- Attachment A: Bicycle and Pedestrian Attachments
- Attachment B: Local Streets and Roads Attachments
- Attachment C: Mass Transit Attachments
- Attachment D: Paratransit Attachments
- Other Attachments (*clearly label additional attachments as needed*)

### **Certification of True and Accurate Reporting**

*By signing below, the agency manager and finance manager, or their designees certify the compliance information reported are true and complete to the best of their knowledge, and the audited dollar figures matches exactly to the Measure B revenues and expenditures reported in the compliance report and Tables 1-3.*

X   
\_\_\_\_\_  
**Signature**  
Michael J. Neary, P.E.  
Assistant Director, Oakland Public Works

  
\_\_\_\_\_  
**Date**

X   
\_\_\_\_\_  
**Signature**  
Nila Wong  
Fiscal Services Manager, Oakland Public Works

  
\_\_\_\_\_  
**Date**



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# BICYCLE AND PEDESTRIAN PROGRAM

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## Compliance Report Summary *Fiscal Year 2013-14*

1. Did your agency receive Measure B Bicycle and Pedestrian Funds in the reporting period of July 1, 2013 through June 30, 2014?

- Yes (Complete the Bicycle/Pedestrian section)  
 No (Do not complete the Bicycle/Pedestrian section and continue on)

2. Complete the below contact information.

CONTACT INFORMATION	
Bicycle/Pedestrian Program Agency:	Oakland Public Works
Contact Name:	Bruce Williams
Title:	Funding Program Manager
Phone Number:	510-238-7229
E-mail Address:	bwilliams@oaklandnet.com

3. Complete the Excel Worksheets Tables 1 to 3 for the Bicycle and Pedestrian Program. (Check the boxes below to indicate completion).

- Table 1: Measure B Revenues and Expenditures**  
The values entered into Table 1 must match your agency's audited financial statements and compliance reports. **Please contact Alameda CTC staff if you have questions before submitting your report. All dollar figures must match your audited financial statements and compliance report or Alameda CTC may reject your submission.**
- Table 2: Summary of Expenditures and Accomplishments**  
This table describes actual expenditures and activities incurred for FY 2013-2014 (FY 13-14).
- Table 3: Summary of Planned Projects and Reserve Funds**  
This table describes your agency's plan to expend any remaining Measure B funds within the defined reserve policies of the funding agreement through FY 14-15 thru FY 17-18.

4. If your agency’s ending MB Direct Local Distribution Program fund balance was greater than ZERO, describe why you have this fund balance and identify larger anticipated projects that will use these funds within the next year. Indicate N/A if not applicable.

**Complete Table 3 Summary of Planned Projects and Reserve Funds.**

Oakland has a pass through balance of \$2.185 million dollars, a decrease of over \$1 million since the beginning of the fiscal year. The fund balance reflects the funding of several capital projects over a multi-year period, including sidewalk repair (709K), Skyline Blvd Bikeway (400K) and stairs and paths projects (197K). The City expects to make substantial progress in spending down capital reserves in FY 14/15.

5. Did your agency expend MORE THAN the amount of Measure B funds received in FY 13-14? If yes, how much more did you expend using prior fund balances? Indicate N/A if not applicable.

The City of Oakland spent \$1.16 million more than we received in FY 13/14, spending down our accumulated reserves.

6. **Describe Reserve Funds.** If your agency has Measure B Reserve Funds identified, describe your process to allocate these funds and describe in detail your plan and time frame for using these funds. In addition, if the use of reserves requires additional agency approvals, what is your approval process? **Refer to Reserve Fund Guidance, and complete Table 3 Summary of Planned Projects and Reserve Funds.**

Oakland budgets on a bi-annual basis, based on Measure B projections at the time. Projects and programs in the CIP are allocated funds at that time. Reserve funds may be funds received in excess of budget projections, or remaining funds from closed projects. Reserve funds are available for unanticipated project costs of approved projects, and grant matching. Council approves the appropriation of any Measure B funds used to match grants at the time of grant submission or approval, depending on the requirements of the grant. In addition, third party contracts greater than \$50,000 also require approval by Council.

7. Alameda CTC uses the data from Table 2 to monitor compliance with the Master Programs Funding Agreement requirement (Section 5.1.d): "All projects and programs that use Measure B Bicycle and Pedestrian Safety pass-through funds must receive governing board approval prior to the jurisdiction expending the pass-through funding on the project/program."

**If your agency expended funds on any projects not approved by your governing board in advance (as indicated in Column Q of Table 2: Governing Board Approval), list them below and explain why your agency expended funds without agency approval.**

All projects and programs received governing board approval, either through the budget/CIP process, or through grant application/acceptance processes.

8. **Describe the governing board approval for future planned projects and/or programs.** List the document type, time period, and resolution approval date. Examples include a bicycle and/or pedestrian plan, capital improvement plan, prioritized project list, etc.

Document Type	Time Period	Resolution Date
Oakland Policy Budget and CIP	FY 13/14-FY14/15	June 27, 2013
Oakland Bicycle Master Plan	FY 2012-2022	December 4, 2012
Oakland Pedestrian Master Plan	FY 2002-2022	November 12, 2002

- 9a. **Verify Bicycle/Pedestrian Master Plan Adoption.** Per Section 7 of the Master Programs Fund Agreement Bicycle/Pedestrian Safety Program Implementation Guidelines, Alameda CTC requires local jurisdictions to have current individual or combined Bicycle and Pedestrian Master Plans **(updated every five years)** or demonstrate these plans will be adopted by December 31, 2015.

**Does your agency have current Bicycle and Pedestrian Master Plans, and if so, when were these last adopted by your governing board? If not, describe the steps your agency is taking to ensure a Bicycle and Pedestrian Master Plans will be adopted by the December 31, 2015 deadline.**

Yes, our agency has current Bicycle and Pedestrian Master Plans (dates listed above). The City is planning to update our Pedestrian Master Plan in 2015.

- 9b. Bicycle and Pedestrian Master Plans must include core elements to ensure the plans are effective and facilitate countywide planning.
- Required core elements for **pedestrian plans** are described in the *Toolkit for Improving Walkability in* [http://www.alamedactc.org/files/managed/Document/11852/ACTIA\\_Ped\\_Toolkit\\_UPDATE\\_FINAL\\_EL\\_web\\_2009.pdf](http://www.alamedactc.org/files/managed/Document/11852/ACTIA_Ped_Toolkit_UPDATE_FINAL_EL_web_2009.pdf)
  - Alameda CTC is currently developing guidelines that outline required core elements for **bicycle plans**; these guidelines will apply to plans for which plan development commences after guidelines are completed. Until these guidelines are developed, bicycle plans should demonstrate that they contain the core elements from the California Streets and Highways Code

Section 891.2 (see link below for a checklist of these items):  
[http://www.dot.ca.gov/hq/LocalPrograms/bta/PDFs/Sec891\\_2.pdf](http://www.dot.ca.gov/hq/LocalPrograms/bta/PDFs/Sec891_2.pdf)

**Which core elements are included in your agency’s Bicycle and Pedestrian Master**

**Plan(s)?** Note that links to appendices of the plan document that demonstrate compliance with required core elements may be provided in response to this question.

Oakland’s Pedestrian Master Plan includes: an introduction with summary of purpose in Chapter 1; existing conditions, including an assessment of street grid connectivity and collisions in Chapter 2; a pedestrian route analysis, identifying key pedestrian generators and attractors and assessing needs in Chapter 3; policy recommendations, which present goals, policies, and objectives, including a an education plan in Chapter 4; design guidelines in Chapter 5 and Appendix C; an implementation plan with a project priority list including cost and phasing for new and maintenance projects, and a list of potential funding sources in Chapter 6; an inventory of sidewalks in Appendices A and B, and crosswalk guidelines in Appendix E. Existing planning and policy documents are referenced throughout.

Appendix A of Oakland’s bicycle and pedestrian master plan describes its compliance with the Streets and Highways Code Section 891.2.  
<http://www2.oaklandnet.com/oakca1/groups/pwa/documents/report/oak024982.pdf>

**10. Did your agency publish an article(s) that highlight Bicycle/Pedestrian projects and programs funded by Measure B in an agency or Alameda CTC newsletter?**

Yes. If yes, complete the table below and INCLUDE a copy of the article(s) as Attachment A: Bicycle and Pedestrian Program Attachments.

Publication	Date Published (Month/Year)	Confirm Copy Attached? (Y/N)
I Bike Oakland	Winter 2014	Y

No. If no, explain in the box below.

**11. Did your agency include a description of the Bicycle/Pedestrian projects and programs funded by Measure B on its website?**

Yes. If yes, include a printout of the website as Attachment A and provide the URL below that contains updated and accurate project information.

Website Address	Confirm Printout Copy Attached? (Y/N)
http://www2.oaklandnet.com/Government/o/PWA/o/EC/s/MeasureB/index.htm	Y

No. If no, explain in the box below.

**12. Did your agency use signage that indicates use of Measure B funds for its Bicycle/Pedestrian projects and programs?**

Yes. If yes, include photos of the posted signage in Attachment A and describe the signage below.

Signage Location / Project	Confirm Photos Attached? (Y/N)
Sign installed at Lakeshore/Lake Park Complete Streets project	Y

No. If no, explain in the box below.

**13a. Describe your agency’s effectiveness at meeting your planned FY 13-14 expenditures reported in the last compliance report and reasons for any variations.** Agencies are expected to expend their planned expenditures from their individual projects and/or and reserve funds. **Did your agency expend the amount planned?**

We expended more than the entire amount planned, cumulatively. We did not expend the entire amount planned for each project, but the only program which was significantly underspent (stairs and paths program) in retrospect should have been programmed in a multi-year capital program. Programmed funds in that program are projected to be spent in FY 14/15.

**13b. If your agency expended LESS THAN the planned amount, provide detailed justification on why dollars were not spent, and reference specific projects that did not expend the funds as planned.** Indicate N/A if not applicable.

N/A

**13c. If your agency expended MORE THAN planned amount for a particular project/reserve, explain why and describe any adjustments to the reserves to finance the surplus amount. Indicate N/A if not applicable.**

We were able to spend substantially more than the anticipated amount on pedestrian signals and on bikeways implementation in the capital reserve. We advanced these funds from future years in the same category.

We expended funds for project close-out costs for Lakeshore/Lake Park Complete Streets and 7<sup>th</sup> Street West Oakland Transit Village, using funds from the undesignated reserve.

We expended funds for several Pedestrian CIP projects that were approved during the fiscal year, and funded them through the undesignated reserve. In future years these are in the Capital reserve.

**14. Provide additional information, if necessary, to further explain Measure B expenditures for the Bicycle and Pedestrian Program.**





# LOCAL STREETS AND ROADS (LSR) PROGRAM

## Compliance Report Summary *Fiscal Year 2013-14*

1. Did your agency receive Measure B Local Streets and Roads Funds in the reporting period of July 1, 2013 through June 30, 2014?

- Yes (Complete the LSR section)  
 NO (Do not complete the LSR section and continue on)

2. Complete the below contact information.

CONTACT INFORMATION	
LSR Program Agency:	Oakland Public Works
Contact Name:	Bruce Williams
Title:	Funding Program Manager
Phone Number:	(510) 238-7229
E-mail Address:	bwilliams@oaklandnet.com

3. Complete the Excel Worksheets Tables 1 to 3 for the Local Streets and Road Program. (Check the boxes below to indicate completion).

- Table 1: Measure B Revenues and Expenditures**  
 The values entered into Table 1 must match your agency's audited financial statements and compliance reports. **Please contact Alameda CTC staff if you have questions before submitting your report. All dollar figures must match your audited financial statements and compliance report or Alameda CTC may reject your submission.**
- Table 2: Summary of Expenditures and Accomplishments**  
 This table describes actual expenditures and activities incurred for FY 2013-2014 (FY 13-14).
- Table 3: Summary of Planned Projects and Reserve Funds**  
 This table describes your agency's plan to expend any remaining Measure B funds within the defined reserve policies of the funding agreement through FY 14-15 thru FY 17-18.

4. If your agency's ending MB Direct Local Distribution Program fund balance was greater than ZERO, describe why you have this fund balance and identify anticipated projects that will use these funds within the next year. Indicate N/A if not applicable. **Complete Table 3 Summary of Planned Projects and Reserve Funds.**

Oakland's ending balance is \$9.26 million dollars, or about one years' Measure B income. Of that, the majority is pre-committed to multi-year capital projects, including paving, curbs/sidewalks, bridge seismic rehabilitation, as well as providing local match to HSIP projects. Currently, \$3.25 million is encumbered to paving projects underway in FY 14/15, and an additional \$1.0 million has been contracted in curbs/sidewalks.

5. Did your agency expend MORE THAN the amount of Measure B funds received in FY 13-14? If yes, how much more did you expend using prior fund balances? Indicate N/A if not applicable.

N/A

6. **Describe Reserve Funds.** If your agency has Measure B Reserve Funds identified, describe your process to allocate these funds and describe in detail your plan and time frame for using these funds. In addition, if the use of reserves requires additional agency approvals, what is your approval process? **Refer to Reserve Fund Guidance, and complete Table 3 Summary of Planned Projects and Reserve Funds.**

Oakland budgets on a bi-annual basis, based on Measure B projections at the time. Reserve funds may be funds received in excess of budget projections, or remaining funds from closed projects. Reserve funds are available for unanticipated project costs and grant matching. Council approves the appropriation of any Measure B funds used to match grants at the time of grant submission or grant approval, depending on the requirements of the grant. In addition, third party contracts greater than \$50,000 also require approval by Council.



7. Alameda CTC uses the data from Table 2 to monitor compliance with the Master Programs Funding Agreement requirement (Section 5.d.): "All projects and programs that use Measure B Local Streets and Roads pass-through funds must receive governing board approval prior to the jurisdiction expending the pass-through funding on the project/program."

**If your agency expended funds on any projects not approved by your governing board in advance (as indicated in Column T of Table 2: Governing Board Approval), list them below and explain why your agency expended funds without agency approval.**

Measure B local streets and roads funds are appropriated through the bi-annual budget process, adopted by Council, to fund local streets and roads capital and operating expenses. Any project with a contract of over \$50,000, and most grant fund projects of any size also require Council approval individually. The City of Oakland does not expend any Measure B funds on projects/programs not approved by Oakland City Council.

8. **Describe the governing board approval for future planned projects and/or programs.** List the document type, time period, and resolution approval date. Examples include a bicycle and/or pedestrian plan, capital improvement plan, prioritized project list, etc.

Document Type	Time Period	Resolution Date
Oakland Policy Budget and CIP	FY 13/14-14/15	6/27/2013
Oakland Bicycle Master Plan	2012-2022	12/4/2012
Oakland Pedestrian Master Plan	2002-2022	11/12/2002

10. **Complete the table below to describe your jurisdiction's road miles and conditions.**

Jurisdiction's Information	
<b>CURRENT POPULATION</b> Refer to the California Department of Finance's Population Estimates: <a href="http://www.dof.ca.gov/research/demographic/reports/estimates/e-1/documents/E-1_2014_Internet_Version.xls">http://www.dof.ca.gov/research/demographic/reports/estimates/e-1/documents/E-1_2014_Internet_Version.xls</a>	404,355
<b>CERTIFIED NUMBER OF ROAD-MILES</b> Consistent with the amount reported to state and federal agencies.	1963
<b>PAVEMENT CONDITION INDEX (PCI) FOR AGENCY'S LOCAL STREETS AND ROADS</b> Use Metropolitan Transportation Commission's 2013 PCI Data expected by November 2014	60
<b>If the PCI Falls below a total average of 60 (Fair Condition), specify what actions are being implemented to increase the PCI.</b>  <i>Indicate N/A if not applicable.</i>	N/A

**11. Did your agency publish an article(s) that highlight Local Streets and Roads projects and programs funded by Measure B in an agency or Alameda CTC newsletter?**

Yes. If yes, complete the table below and INCLUDE a copy of the article(s) as Attachment B: Local Streets and Roads Program Attachments.

Publication	Date Published (Month/Year)	Confirm Copy Attached? (Y/N)
I Bike Oakland (repaving project)	Summer, 2014	Y

No. If no, explain in the box below.

**12. Did your agency include a description of the Local Streets and Roads projects and programs funded by Measure B on its website?**

Yes. If yes, include a printout of the website as Attachment B and provide the URL below that contains updated and accurate project information.

Website Address	Confirm Printout Copy Attached ? (Y/N)
<a href="http://www2.oaklandnet.com/Government/o/PWA/o/EC/s/MeasureB/index.htm">http://www2.oaklandnet.com/Government/o/PWA/o/EC/s/MeasureB/index.htm</a>	Y

No. If no, explain in the box below.

**13. Did your agency use signage that indicates use of Measure B funds for its Local Streets and Roads projects and programs?**

Yes. If yes, include photos of the posted signage in Attachment B and describe the signage below.

Signage Location / Project	Confirm Photos Attached? (Y/N)
Hegenberger Bridge Seismic Retrofit	Y

No. If no, explain in the box below.

**14a. Describe your agency's effectiveness at meeting your planned FY 13-14 expenditures reported in the last compliance report and reasons for any variations.** Agencies are expected to expend their planned expenditures from their individual projects and/or and reserve funds. **Did your agency expend the amount planned?**

Oakland spent more than initially estimated in both the planned and capital expenditures categories through conservative estimating.

**14b. If your agency expended LESS THAN the planned amount, provide detailed justification on why dollars were not spent, and reference specific projects that did not expend the funds as planned.** Indicate N/A if not applicable.

N/A

**14c. If your agency expended MORE THAN planned amount for a particular project/reserve, explain why and describe any adjustments to the reserves to finance the surplus amount.** Indicate N/A if not applicable.

Oakland spent 286K more than estimated in Emergency Roadway repair, because this need is highly variable from year to year; excess was expended through the operating reserve. 400K was spent on ITS MasterPlan improvements in advance of estimates which conservatively assumed spending in FY 14/15. Several other projects spent less than 100K more than previously estimated; funds were either advance from future year allocations, or from undesignated reserves.

**15. Provide additional information, if necessary, to further explain Measure B expenditures for the Local Streets and Roads Program.**

N/A



# MASS TRANSIT PROGRAM

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## Compliance Report Summary *Fiscal Year 2013-14*

1. Did your agency receive Measure B Mass Transit Funds in the reporting period of July 1, 2013 through June 30, 2014?

- Yes (Complete the Mass Transit section)  
 No (Do not complete the Mass Transit section and continue on)

2. Complete the below contact information.

CONTACT INFORMATION	
Mass Transit Program Agency:	
Contact Name:	
Title:	
Phone Number:	
E-mail Address:	

3. Complete the Excel Worksheets Tables 1 to 3 for the Mass Transit Program.  
*(Check the boxes below to indicate completion).*

- Table 1: Measure B Revenues and Expenditures**  
 The values entered into Table 1 must match your agency's audited financial statements and compliance reports. **Please contact Alameda CTC staff if you have questions before submitting your report. All dollar figures must match your audited financial statements and compliance report or Alameda CTC may reject your submission.**
- Table 2: Summary of Expenditures and Accomplishments**  
 This table describes actual expenditures and activities incurred for FY 2013-2014 (FY 13-14).
- Table 3: Summary of Planned Projects and Reserve Funds**  
 This table describes your agency's plan to expend any remaining Measure B funds within the defined reserve policies of the funding agreement through FY 14-15 thru FY 17-18.

4. If your agency's ending MB Direct Local Distribution Program fund balance was greater than ZERO, describe why you have this fund balance and identify larger anticipated projects that will use these funds within the next year. Indicate N/A if not applicable.

**Complete Table 3 Summary of Planned Projects and Reserve Funds.**

5. Did your agency expend MORE THAN the amount of Measure B funds received in FY 13-14? If yes, how much more did you expend using prior fund balances? Indicate N/A if not applicable.

6. **Describe Reserve Funds.** If your agency has Measure B Reserve Funds identified, describe your process to allocate these funds and describe in detail your plan and time frame for using these funds. In addition, if the use of reserves requires additional agency approvals, what is your approval process? **Refer to Reserve Fund Guidance, and complete Table 3 Summary of Planned Projects and Reserve Funds.**



**7. Did your agency publish an article(s) that highlight Mass Transit projects and programs funded by Measure B in an agency or Alameda CTC newsletter?**

Yes. If yes, complete the table below and **INCLUDE** a copy of the article(s) as Attachment C: Mass Transit Program Attachments.

Publication	Date Published (Month/Year)	Confirm Copy Attached? (Y/N)

No. If no, explain in the box below.

**8. Did your agency include a description of the Mass Transit projects and programs funded by Measure B on its website?**

Yes. If yes, include a printout of the website as Attachment C and provide the URL below that contains updated and accurate project information.

Website Address	Confirm Printout Copy Attached? (Y/N)

No. If no, explain in the box below.

**9. Did your agency use signage that indicates use of Measure B funds for its Mass Transit projects and programs?**

Yes. If yes, include photos of the posted signage in Attachment C and describe the signage below.

Signage Location / Project	Confirm Photos Attached? (Y/N)

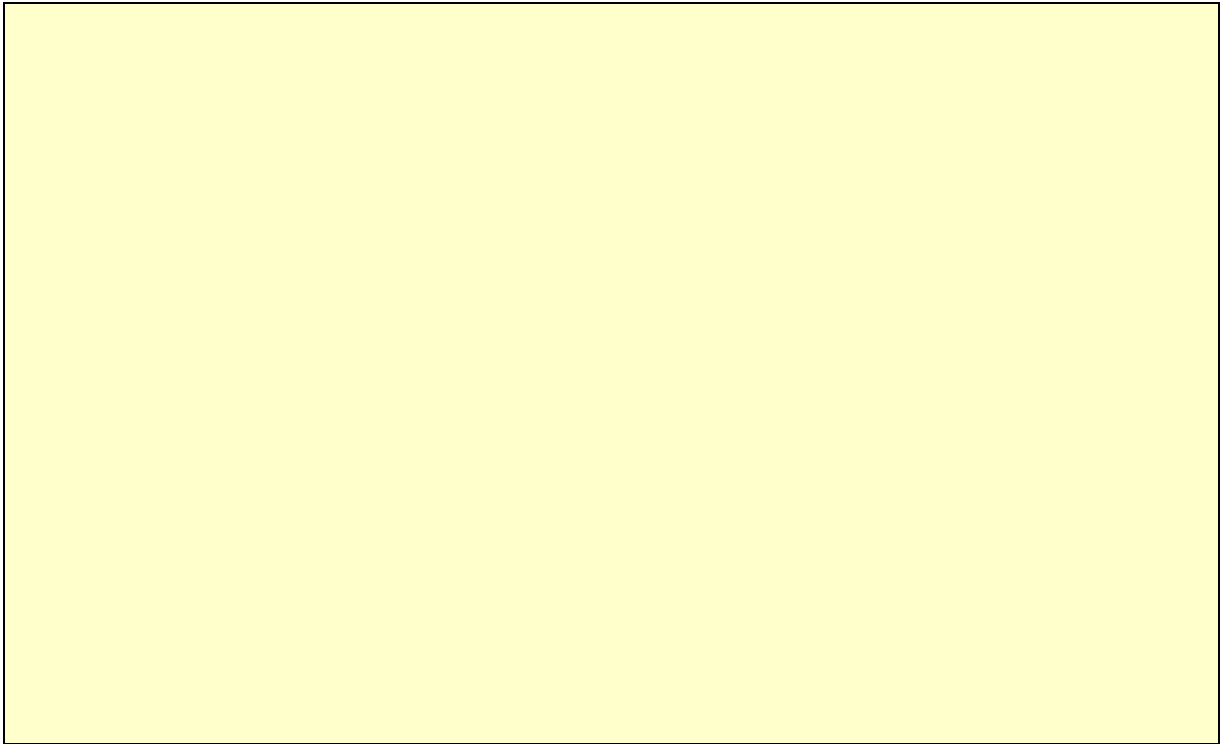
No. If no, explain in the box below.

**10a. Describe your agency's effectiveness at meeting your planned FY 13-14 expenditures reported in the last compliance report and reasons for any variations.** Agencies are expected to expend their planned expenditures from their individual projects and/or and reserve funds. **Did your agency expend the amount planned?**

**10b. If your agency expended LESS THAN the planned amount, provide detailed justification on why dollars were not spent, and reference specific projects that did not expend the funds as planned.**  
*Indicate N/A if not applicable.*

**10c. If your agency expended MORE THAN planned amount for a particular project/reserve, explain why and describe any adjustments to the reserves to finance the surplus amount.** *Indicate N/A if not applicable.*

**11. Provide additional information, if necessary, to further explain Measure B expenditures for the Mass Transit Program**

A large, empty rectangular box with a thin black border, intended for providing additional information or explanations regarding Measure B expenditures for the Mass Transit Program.

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# PARATRANSIT PROGRAM

## Compliance Report Summary *Fiscal Year 2013-14*

1. Did your agency receive Measure B Paratransit Funds in the reporting period of July 1, 2013 through June 30, 2014?

- Yes (Complete the Paratransit section)  
 NO (Do not complete the Paratransit section)

2. Complete the below contact information.

CONTACT INFORMATION	
Paratransit Program Agency:	City of Oakland
Contact Name:	Hakeim McGee
Title:	Senior Services Supervisor
Phone Number:	(510) 238-2311
E-mail Address:	<a href="mailto:hmcgee@oaklandnet.com">hmcgee@oaklandnet.com</a>

3. Complete the Excel Worksheets Tables 1 to 3 for the Paratransit Program.  
*(Check the boxes below to indicate completion).*

- Table 1: Measure B Revenues and Expenditures**  
 The values entered into Table 1 must match your agency's audited financial statements and compliance reports. **Please contact Alameda CTC staff if you have questions before submitting your report. All dollar figures must match your audited financial statements and compliance report or Alameda CTC may reject your submission.**
- Table 2: Summary of Expenditures and Accomplishments**  
 This table describes actual expenditures and activities incurred for FY 2013-2014 (FY 13-14).
- Table 3: Summary of Planned Projects and Reserve Funds**  
 This table describes your agency's plan to expend any remaining Measure B funds within the defined reserve policies of the funding agreement through FY 14-15 thru FY 17-18.

4. If your agency's ending MB Direct Local Distribution Program fund balance was greater than ZERO, describe why you have this fund balance and identify anticipated projects that will use these funds within the next year. *Indicate N/A if not applicable.*

**Complete Table 3 Summary of Planned Projects and Reserve Funds.**

No, the City of Oakland's ending MB balance was not greater than zero for FY 13/14

5. Did your agency expend MORE THAN the amount of Measure B funds received in FY 13-14? If yes, how much more did you expend using prior fund balances? *Indicate N/A if not applicable.*

No, the City of Oakland did not expend more than the amount of Measure B funds received in FY 13/14

6. **Describe Reserve Funds.** If your agency has Measure B Reserve Funds identified, describe your process to allocate these funds and describe in detail your plan and time frame for using these funds. In addition, if the use of reserves requires additional agency approvals, what is your approval process? **Refer to Reserve Fund Guidance, and complete Table 3 Summary of Planned Projects and Reserve Funds.**

No, the City of Oakland did not have a Measure B Reserve fund at the end of FY 13/14

**7. List the amount of the FY 13-14 Total Operating Expenses allocated to the following categories.**

Category	Expense Amount
Management ( <i>oversight, planning, budgeting, etc.</i> )	\$ 338,465
Customer Service and Outreach Activities	\$ 115,817
Trip Provision ( <i>direct or contracted taxis, vans, shuttles, etc.</i> )	\$ 529,055
<b>TOTAL Operating Expenses:</b>	<b>\$ 983,337</b>

**8a. List the total number of trips provided and services provided in FY 13/14.**

Trips / Service Types	Quantity <i>(match to Table 2, Excel Form)</i>
Number of One-way unduplicated trips	
ADA Mandated Paratransit	
Door-to-Door Program / Van Services	13,471
Taxi Program	15,609
Fixed-Route Services	
Group Trips	
Volunteer Driver Program	
Other: [Specify here]	
Number of contacts through Mobility Management/Travel Training	
Number of Scholarships provided	
Number of Meals Delivered	

**8b. Complete the table below with available service quality data for reservations and trips.** If no data is available, skip this question and complete 8c and 8d.

Cancelled Trip Reservations <i>(percent)</i>	Passenger No-shows <i>(percent)</i>	On-time Pickups <i>(percent)</i>	Late Pickups <i>(percent)</i>	Missed Trips, Provider No-shows* <i>(percent)</i>	Average Ride Time <i>(minutes)</i>
Not tracked	Not tracked	88%	12%	Not tracked	20

*\*Includes very late pickups*

**8c. Describe your complaint and commendation process.** Describe the process from beginning to end, including instructions you provide to customers for filing complaints or commendations, your document procedures, and your follow up.

City of Oakland registrants are provided a rider's guide that instructs the following:

- Record the date, company, driver's name and vehicle #.
- Contact the taxi/van company management directly and/or report the information

to Paratransit staff.

- Staff will document the information whether it is a complaint or commendation, then communicate with the company and place a follow up status call to the client.
- If a complaint is serious in nature with a taxi company, the matter is forwarded to the City Administrator’s Taxi Detail Office for action and/or permanent filing.
- Serious complaints with van services are handled internally at the direction of Executive Management.

Appropriate sanctions or acknowledgements result on a case by case basis.

**8d. Describe any common or recurring complaints your program has received and any program changes as a result. Did the number of complaints increase or decrease compared to the prior year?**

Historically, Oakland has not experienced a great influx of complaints and the program achieved a 90% satisfaction rate for this reporting period. However, majority of the issues that are reported, are communicated in responses to an annual program survey. Below are some recurring issues for the taxi and van services respectively:

Taxi:

- Some drivers are rude and not always happy to serve taxi scrip clients. They want cash.
- Make more taxi scrip available.

Van:

- Sunday service is desired.
- Make more van vouchers available.

In relation to more taxi scrip and van vouchers being available, of course that is tied to financial resources. Staff makes every attempt to monitor revenues to look for opportunities to expand services, as well as attempts to identify other funding sources.

In order to address the various taxi driver sensitivity issues, staff encourages riders to report any incidents immediately so they can be addressed sooner than later. Oakland’s Taxi Detail handles any serious complaints that can result in various penalties should investigations determine such actions are warranted.

Sunday van service is another area of importance. Staff consistently keeps this issue at the forefront in order to hopefully address this in the future; however, there are numerous factors that impact the ability to immediately resolve that pertain to budget limitations, staffing, demand, etc.





9. Does your agency have service quality data available about ridership? If so, enter the data in the applicable boxes below.

Number of Registered Riders (as of 6/30/14)	Number of Riders Added to Program in FY 13-14	Number of Riders on Wait List	Number of Accidents and Incidents*
1,166	259	0	0

\*Report incidents resulting in any of the following: a fatality other than a suicide, injuries requiring immediate medical attention away from the scene for two or more persons, property damage equal to or exceeding \$7,500, an evacuation due to life safety reasons, or a collision at a grade crossing.

10. Did your agency publish an article(s) that highlight Paratransit projects and programs funded by Measure B in an agency or Alameda CTC newsletter?

Yes. If yes, complete the table below and INCLUDE a copy of the article(s) as Attachment D: Paratransit Program Attachments.

Publication	Date Published (Month/Year)	Confirm Copy Attached? (Y/N)

No. If no, explain in the box below.

An article for publication in the Alameda CTC newsletter was submitted on February 13, 2014; however, it didn't get published during the reporting period. ACTC staff acknowledged receipt of the article on time, thus satisfying the requirement. The article has since been updated for the current fiscal year and it also includes FY 13-14 information as well.

11. Did your agency include a description of the Paratransit projects and programs funded by Measure B on its website?

Yes. If yes, include a printout of the website as Attachment D and provide the URL below that contains updated and accurate project information.

Website Address	Confirm Printout Copy Attached? (Y/N)
<a href="http://www2.oaklandnet.com/Government/o/DHS/s/AAS/o/OPED/index.htm">http://www2.oaklandnet.com/Government/o/DHS/s/AAS/o/OPED/index.htm</a>	Y

No. If no, explain in the box below.

12. Did your agency use signage that indicates use of Measure B funds for its Paratransit projects and programs?

Yes. If yes, include photos of the posted signage in Attachment D and describe the signage below.

Signage Location / Project	Confirm Photos Attached? (Y/N)
Vehicle Signage	Y
Customer Service Reception Area	Y

No. If no, explain in the box below.

**13a. Describe your agency’s effectiveness at meeting your planned FY 13-14 expenditures reported in the last compliance report and reasons for any variations.** Agencies are expected to expend their planned expenditures from their individual projects and/or and reserve funds. **Did you expend the amount planned?**

The City of Oakland was highly effective at expending the FY 13/14 plan, in addition to the supplemental Measure B funds received above the original FY 13/14 projection.

**13b. If your agency expended LESS THAN the planned amount, provide detailed justification on why dollars were not spent, and reference specific projects that did not expend the funds as planned.**  
Indicate N/A if not applicable.

Not applicable. Oakland expended more than the planned amount in FY 13/14.

**13c. If your agency expended MORE THAN planned amount for a particular project/reserve, explain why and describe any adjustments to the reserves to finance the surplus amount. Indicate N/A if not applicable.**

The City of Oakland expended more than the FY 13/14 planned amount due to the receipt of Measure B revenue above and beyond what was initially projected. There were no Measure B reserves applied to the project as there were none.

**14. Provide additional information, if necessary, to further explain Measure B expenditures for the Paratransit Program.**